

## Modules up from 16% to 32% of RFMD's business

For RF Micro Devices Inc (Greensboro, NC, USA) sales for fiscal Q4/2001 (to end-March) were US\$55m (down 31.2% on the December quarter). Power amplifier (PA) module revenues (including volume shipments for an existing dual-band GSM handset for its largest customer) were up 41% (from 16% of total revenues - see Issue 2, page 6 - to 32%, though yield losses during ramp-up reduced profits).

These contributed to RFMD being 100% booked and expecting 20% growth in the June quarter. Also, the start of volume production of a GSM/GPRS PA module should boost growth in the September quarter (when RFMD's second fab should begin operation).

Other new GSM/GPRS PAs for new customers (including Siemens) should contribute to growth in second-half 2001. Several new CDMA design wins (via the alliance with QUALCOMM) should begin production shipment in the December quarter. RFMD expects a return to profitability in second-half 2001.

President and CEO David Norbury reckons RFMD is "well positioned to gain market share and grow revenues sequentially in advance of the overall recovery in the handset market".

\* At March's *CTIA Wireless 2001* event in Las Vegas, NM, USA, RFMD launched:

- the SiGe HBT-based RF2489 low-noise amplifier/mixer (available in Q3/2001) - a receiver front-end designed for the North American market for complete dual-band, tri-mode CDMA/AMPS/PCS handsets (though it has also generated interest among manufacturers of Japanese J-CDMA/GPS and South Korean K-PCS CDMA/GPS handsets).

- the GaAs HBT-based RF2475 dual-band receivers for TDMA handsets, which include two low-noise amplifiers and associated down-converting mixers, a frequency doubler (reducing the number of voltage controlled oscillators required) and dual-transmit local oscillator (LO) output buffers (eliminating the external drivers for the LO signal feeding the transmit path).

## III-Vs market to bottom in Q2, says Kopin

Kopin Corp (Taunton, MA, USA) has reported Q1/2001 revenues of US\$15.0m (24% down on Q1/2000): III-V products US\$10.8m (34% down), due to the "high level of wireless handset and broadband inventories in the supply chain", says president and CEO Dr John C C Fan.

"The III-V market will reach the bottom of the downturn in Q2/2001", reckons Kopin. Total Q2 revenues should be US\$10-12m. However, increasing order

rates for its 6" HBT wafers will be met by ramping up volume production by end-Q2/2001. "Our new products in 6" HBTs, InP and GAIN HBTs position us for strong growth when the wireless and broadband markets rebound", says Fan.

Also, Kopin's Optical Communications Product group (using Super Epi's optoelectronic materials knowledge) is on schedule to introduce products in late 2001.

## TriQuint sees business for modules and OC-768

For TriQuint Semiconductor Inc (Hillsboro, OR, USA) Q1/2001 sales were US\$80.9m (up 37% on Q1/2000 but down 10% on Q4/2000).

Orders were very weak in the mobile phone, datacom and low-end SONET markets but strong for satellite

communications, broadband digital wireless, and defense electronics markets.

Major design wins included OC768 designs. Also, two major Korean manufacturers will be using its CDMA HBT high-band and low-band Power Amplifiers in module form.

## ANADIGICS to see 35% sales drop

ANADIGICS has reported Q1/2001 sales of US\$28.5m (down 33.7% on Q1/2000 but only 7% down on Q4/2000). However, it expects Q2/2001

sales of just US\$18.5m (down 35% on Q1, more than the previously forecast drop of 25%), particularly due to softness in broadband markets.

## Vitesse down 26%; opens China office

Vitesse Semiconductor Corp (Camarillo, CA, USA) has reported fiscal Q2/2001 sales (to end March) of US\$121.8m (up 21% on Q2/2000 but down 26% on Q1/2001, its first sequential decline in over 8 years). This is due to "a dramatic reduction in demand from our communications and data storage customers...and an increase in cancellations of orders".

"We expect this phenomenon to continue into the next quarter [to June]," warned president and CEO Lou Tomasetta.

"However, we continue to achieve design wins for our upper layer products [switch fabrics, network processors, and OC-192 physical layer products]," he adds. "We do not see any indications of our customers slowing down development or deployment of next-generation systems".

\* Vitesse is swapping US\$105m worth of stock for fabless semiconductor company Exbit Technology (Herlev, Denmark).

The company employs 62 people (including more than 40 engineers) to develop chip-sets and intellectual property cores for Gigabit and 10 Gb/s Ethernet switching and routing applications in high-speed networks, "a perfect complement to our existing product families," says CEO Lou Tomasetta.

In the past year, after acquisitions including Sitera, FirstPass, and the WAN assets of Philips Semiconductors, Vitesse reckons it can now provide one of the most complete solutions for switching and processing of IP, TDM, and Ethernet data from rates of 10-40 Gb/s.

\* Vitesse has reorganised its operations in Asia-Pacific and established its first direct sales office in China. Headed in Beijing by Jinzhu Li, field applications engineer for Vitesse's China subsidiary, it will help support its distributors in China (which previously reported to its Asia-Pacific headquarters in Tokyo).